

**Economic Empowerment Trust Fund**  
**Form 990 and Form PC Tax Preparation Services RFQ 2016**

**ATTACHMENT A. BIDDER RESPONSE QUESTIONS**

*The responses to Attachment A must be submitted to Jameel Moore, Esq. via mail at Office of the Treasurer and General, One Ashburton Place, 12<sup>th</sup> Floor, Boston, MA 02108-1608 along with the other documents and information specified in Section IV – Submission Instructions of the RFQ.*

Complete the following sections to describe your company and your services.

**Firm Background and Experience**

1. Company information: List company name, address, contact person for bid, and planned contact person for Form 990 and Form PC Tax Preparation services.
2. Bidder Profile: Tell us about your company, including the following:
  - a. A brief history.
  - b. Number of years in business.
  - c. Where the business is located.
  - d. How many employees you have:
    - i. Identify the number of employees that are Certified Public Accountants
    - ii. Identify the number of employees that hold professional certifications or licenses that are relevant to tax preparation/Form 990 and Form PC preparation services. Please identify certifications and licenses included in this response.
  - e. Indicate any complaints that have been levied by the state board of accountancy or other regulatory authority, if any against the firm or its personnel. Indicate any corrective actions that have been taken by the firm.
3. Provide a contract organizational chart or equivalent document, with names showing management, supervisory and other key personnel (including contractors and subcontractors) to be assigned to the contract. The chart/document should show the relationship of the individuals assigned to the contract to the Bidder's overall organizational structure.
4. Tell us about your company's experience in completing Form 990 and Form PC tax preparation services, including the following:
  - a. Detail the firm's experience in providing tax services to entities in the not-for-profit sector.
  - b. Describe Bidder's experience in successfully completing Form 990 and Form PC tax preparation services for projects similar in size and scope to those required in this RFQ.

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- c. Provide a description of similar projects completed by the bidder within the past five (5) years.

**Personnel Background and Experience**

- 5. Personnel Profile: Tell us about your employees, including the following:
  - a. For persons projected to be assigned to the contract, provide a resume and a description of each person's relevant work experiences as it relates to the services sought by this RFQ.
  - b. List the following information for each employee of the Bidder who will be assigned to the contract:
    - i. Functional title/role of each person for the project; and
    - ii. Time commitment/percentage of time each person will spend on the project.
  - c. Any additional information relating to the employees' qualifications and capabilities that pertains to the services required by this RFQ.

**Form 990 and Form PC Tax Preparation Services for EETF**

- 6. If selected, identify when Bidder would be able to begin work on the Economic Empowerment Trust Fund's fiscal year 2016 tax preparation.
- 7. Describe how much notice/time the Bidder typically requires prior to providing Form 990 and Form PC tax preparation services.
- 8. If selected, provide an estimation of when Bidder will be able to complete the requested services as outlined in Section III of the RFQ. If Bidder cannot provide a time estimate of completion, identify variables that may affect the Bidder's ability to complete the RFQ's requested services by October 31, 2016.
- 9. Describe how long it typically takes the Bidder to complete Form 990 and Form PC tax preparation services for a 501(c)(3) organization that has fiscal year revenues of approximately \$100,000.00.
- 10. Describe how the Bidder will approach the tax preparation for the EETF, including the use of any association or affiliate member firm personnel and the areas that will receive primary emphasis. Discuss the firm's use of technology in the Tax Preparation. Describe the Bidder's capabilities relating to the filing of EETF's completed Form 990 and Form PC. Also discuss the communication process used by the firm to discuss issues with the EETF.
- 11. Describe where the Bidder will complete the requested services, i.e., the Bidder's office, Treasury offices, or a combination thereof.

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12. Provide any additional information relating to the Bidder's qualifications and capabilities to perform the services required by this RFQ.